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Bib Data Sheet

CONFIRMATION NO. 6492

<b>SERIAL NUMBER</b> 10/091,046	<b>FILING DATE</b> 03/05/2002 <b>RULE</b>	<b>CLASS</b> 705	<b>GROUP ART UNIT</b> 2161	<b>ATTORNEY DOCKET NO.</b> P6340 (301101-000009)
<b>APPLICANTS</b> Peng Chen, Elmhurst, IL; Roger Ibbotson, Hamden, CT; Michael C. Henkel, Evanston, IL;				
<b>** CONTINUING DATA *****</b>  <b>** FOREIGN APPLICATIONS *****</b>				
<b>IF REQUIRED, FOREIGN FILING LICENSE GRANTED ** SMALL ENTITY **</b> <b>** 03/27/2002</b>				
Foreign Priority claimed <input type="checkbox"/> yes <input checked="" type="checkbox"/> no 35 USC 119 (a-d) conditions met <input type="checkbox"/> yes <input checked="" type="checkbox"/> no <input type="checkbox"/> Met after Allowance Verified and Acknowledged <i>N. Abraham</i> Examiner's Signature Initials		<b>STATE OR COUNTRY</b> IL	<b>SHEETS DRAWING</b> 7	<b>TOTAL CLAIMS</b> 63
				<b>INDEPENDENT CLAIMS</b> 9
<b>ADDRESS</b> Jefferson Perkins Piper Marbury Rudnick & Wolfe P.O. Box 64807 Chicago, IL 60440-0807				
<b>TITLE</b> Automatically allocating and rebalancing discretionary portfolios				
<b>FILING FEE RECEIVED</b> 1009	FEES: Authority has been given in Paper No. _____ to charge/credit DEPOSIT ACCOUNT No. _____ for following:		<input type="checkbox"/> All Fees <input type="checkbox"/> 1.16 Fees ( Filing ) <input type="checkbox"/> 1.17 Fees ( Processing Ext. of time ) <input type="checkbox"/> 1.18 Fees ( Issue ) <input type="checkbox"/> Other _____ <input type="checkbox"/> Credit	